

Legislative Update

David Panush

Director, Government Relations

California Health Benefit Exchange

CalHEERS Update

Juli Baker

Chief Technology Officer

California Health Benefit Exchange

CalHEERS Update: Gate Review

- Conducted Gate Review with CMCS Sept 6-7
 - Focused on dependencies between CalHEERS project and subprojects (i.e. SAWS systems updates, MEDS updates, and MAXe2) from a technical and project management perspective
 - Outbrief by CMCS indicated it was a good review and were appreciative of our efforts and progress to date
 - Follow up Technical Interchange Meeting with CCIIO on September 20th

CalHEERS Update: Project Status

- Project Status
 - Conducting Joint Application Design (JAD) sessions
 - JADs include CalHEERS, Exchange, DHCS, MRMIB, OSI and SAWS Consortia staff
 - JAD Schedule and Status:
 - September 7 – October 29, 2012
 - All JADs planned to date completed per schedule
 - All requirements validated per schedule
 - Initiated Release 1 General System Design
 - Conducted Walkthrough of Primary Data Center

CalHEERS Update: Release of Funds

- Request to Release Funds Restriction
 - Submitted on July 11, 2012 against 1.2 Federal Establishment Grant
 - Received Notice of Award on September 11, 2012
 - Total approved for release: \$27,824,882

Naming/Tagline Exploration Board Status Update

Chris Kelly

Senior Advisor, Marketing and Outreach

California Health Benefit Exchange

Review Proposed Names

- CaliHealth
- CalAccess
- Welquest/Wellquest
- Covered, CA/Covered, Cal
- PACcess
- Ursa
- Healthifornia
- Eureka
- Avocado

Key Considerations on Naming

1. The brand name will never exist on its own in a vacuum. It is just one part of big system. There will always be supporting creative surrounding the name that will provide context and added meaning.
 - Name. Tagline. Logo. Color. Images. Body Copy. Advertisements. Web sites
2. Adding a modifier such as “Healthlink” or “Health Connector” could dilute the inherent quality of the brand name that makes it memorable. It's the exact opposite of the progressive, historic spirit of the law itself.
 - i.e., these interesting names feel less so with the addition of the modifier: Golden State Healthcare. Sunshine Healthcare. Plumtree Health Solutions (a nursing home)
 - And the opposite, popular brand names we all use and know, i.e., Google and Amazon, aren't called “Google Search Engine” or “Amazon Marketplace”

Name / Tagline Qualitative Focus Groups

Demographics

- Total number of people: 66
 - 37 in Los Angeles (September 11, 2012)
 - 29 in Sacramento (September 12, 2012)
- Age Range
 - 22-30: 19 total
 - 31-40: 27 total
 - 41-54: 20 total

- Languages
 - Spanish-only: 22
 - English: 44 (Many Bilingual)
 - Spanish, Tagalog, Russian, German, Ukrainian, French, Vietnamese, Japanese, Chinese
- Ethnicities
 - African American
 - American Indian
 - Caucasian
 - Hispanic/Latino
 - Mexican, Mexican-American, El Salvadorian, Nicaraguan
 - Asian/Pacific Islander
 - Philippino, Chinese, Vietnamese, Japanese

Top Names from Focus Groups

- Covered, CA
 - CaliHealth
 - Ursa
 - Eureka
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- They all have their own strengths and weaknesses that arose during the Focus Group discussions, but these were the ones that bubbled to the top.
 - Spanish names did not test well with Hispanic/Latino

Next Steps

- Qualitative Name/Tagline final report and review: 9/19-21
- Final selection of 1-2 names/taglines (3 at most): w/o 9/24
- Legal trademark review and domain purchase: w/o 9/24-w/o 10/1
- Logo Creative Development/Review (2-3 logos per name): w/o 10/1- w/o 10/15
- Quanti-Quali Focus Group testing: mid-October
- Quanti-Quali results/review: mid-October
- Final revisions to chosen Logo design: end of October
- Final approval of logo: early November
- Legal review: early November

California Health Benefit Exchange: Outreach and Education Grant Program Preliminary Concepts

Sponsored by:

California Health Benefit Exchange

Department of Health Care Services

Managed Risk Medical Insurance Board

*California Health Benefit Exchange
Board Meeting
September 18, 2012*

Agenda

- Introduction
- Purpose of the Outreach and Education Grant Program
- Goals and Objectives
- Grant Application Timeline
- Guiding Principles
- Outreach and Education Grant Program Timeline
- Key Issues and Considerations

Introduction

The California Health Benefit Exchange (Exchange) anticipates \$40 million in Federal funding to establish and facilitate the Outreach and Education Grant Program over a two year period to include:

- \$20M in 2013 (Level 1.2 Establishment Grant approved 6.5M for period through 6/2013)
- \$20M in 2014 (Future Federal Grant)

The program will engage organizations and entities with trusted relationships with California's uninsured markets to increase awareness and understanding of health coverage options, promote a culture of coverage, motivate Californians to take the next step to enroll and remove barriers to enrollment.

Preliminary Concepts

Purpose of the Outreach and Education Grant Program

- Promote awareness of the benefits of the Affordable Care Act (ACA).
- Provide consumers information and tools where individuals can enroll on their own.
- Complement the broader marketing strategy where specific areas may not be reached (e.g. areas not reached by paid media).
- Complement and build capacity for the Assisters Program.
- Remove barriers to enrollment that keep eligible consumers from applying.
- Drive consumers to Assisters Program resources.

Preliminary Concepts

Goals and Objectives

1. Ensure participation of non-profit organizations with trusted relationships with uninsured markets in the Project Sponsors' approved Outreach and Education Grant Program to be administered during 2013 and 2014.
2. Establish a linguistically and culturally diverse statewide network of outreach and education grantees to target regions and market segments.
3. Deliver a cost-effective program that promotes and maximizes enrollment.

Preliminary Concepts

Goals and Objectives (continued)

4. Ensure the network of grantees will perform the following program priorities, collectively and independently:
 - A. Target outreach and education resources to the counties, employment sectors and organizations with access to market segments with the most opportunity to enroll.
 - B. Access populations with a variety of health status who are eligible for affordable health insurance programs (e.g. Medi-Cal, Healthy Families, and Exchange with subsidies), including the Exchange program without subsidies.
 - C. Deliver culturally and linguistically competent outreach and education messages that respond to the preferences, motivations and challenges of the target market.

Preliminary Concepts

Goals and Objectives (continued)

- D. Employ outreach and education techniques likely to increase awareness of the opportunity to enroll in affordable health insurance in 2014.
- E. Ensure that grantees disseminate clear, accurate and consistent messages to target audiences that eliminate barriers, increase interest and motivate people to enroll in coverage.

Grant Application Timeline

Task	Date
Present Preliminary Concepts from Project Sponsors	Tuesday, September 18, 2012
Stakeholder Webinar	Wednesday, September 26, 2012
Final Written Comments from Stakeholders Due	Friday, October 5, 2012
Board Review first (1 st) draft of comprehensive Grant Application Process	Tuesday, October 16, 2012
Phase I Grant Application Release	Friday, November 16, 2012
Bidders / Grantees Conference	TBD
Phase I Grant Application Response Due	Friday, January 4, 2013
Announcement of Phase I Awards	Friday, February 15, 2013
Phase II Grant Application Release	Monday, April 1, 2013
Bidders / Grantees Conference	TBD
Phase II Grant Application Response Due	Monday, April 29, 2013
Announcement of Phase II Award	Wednesday, May 22, 2013

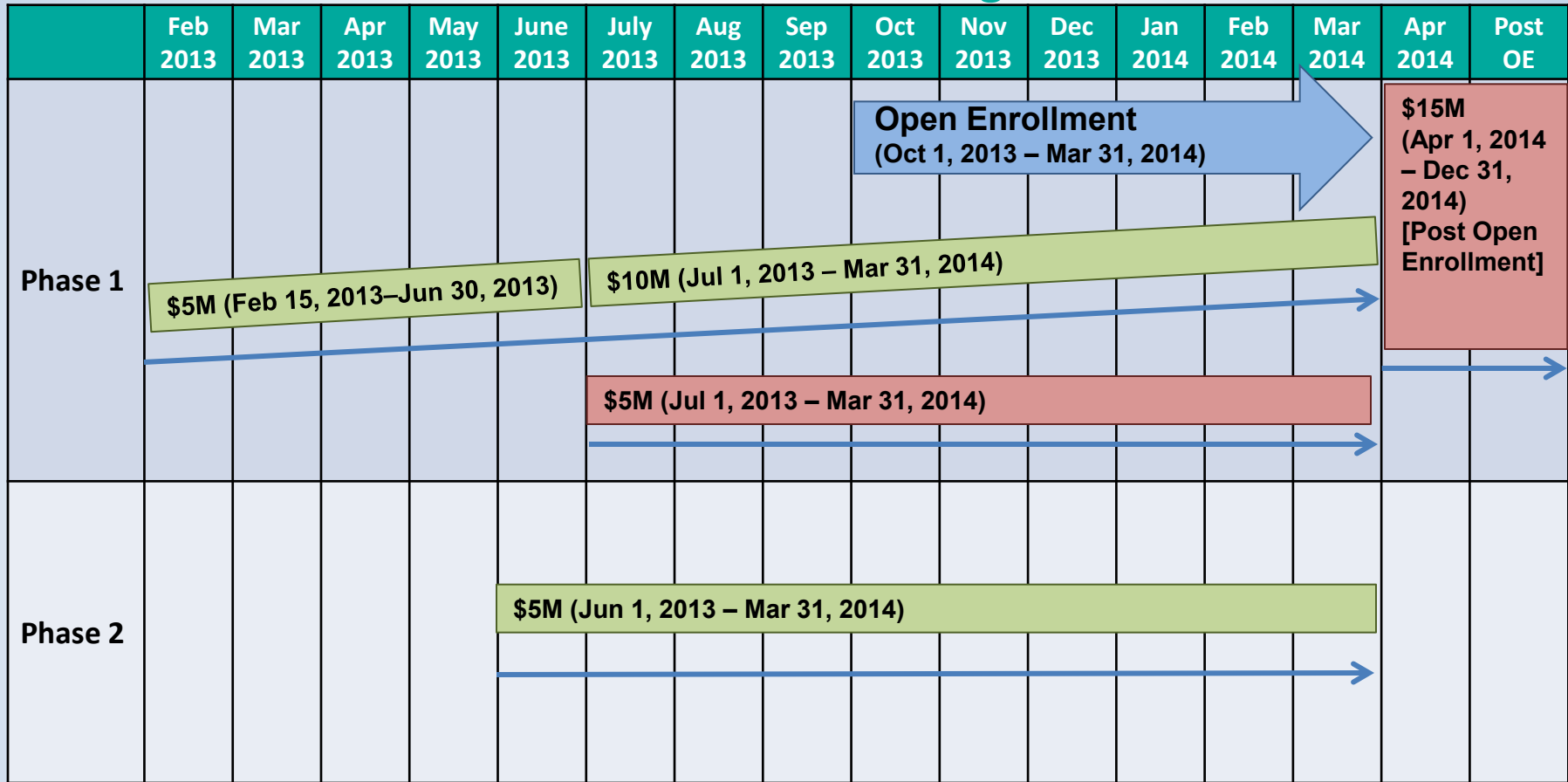
Preliminary Concepts

Guiding Principles

- Target resources based on the greatest opportunity where the highest number of uninsured and subsidy eligible individuals can be reached (e.g. targeting where uninsured and subsidy eligible individuals live, work, play and shop).
- Ensure that all regions and markets in the state, including the hard-to-move (e.g. “invincibles”), rural and limited English proficient populations are reached through the program.
- Complement the Assisters Program and the broader marketing strategy, including plan marketing.

Preliminary Concepts

Outreach and Education Grant Program Timeline



*Level 1.2 Establishment Grant : \$6.5M	\$5M (02/15/2013 – 06/30/2013)	\$15M (07/01/2013 – 03/31/2014)
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**Future Federal Grant :	\$33.5M	\$5M (07/01/2013 – 03/31/2014)	\$15M (04/01/2014 – 12/31/2014)
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\$40M (Total for 2 Years)

Issues and Considerations

Outreach and Education Grant Program issues currently being considered include:

1. Funding Allocation
2. Grant Award Size and Period
3. Required Grant Activities and Statement of Work
4. Selection Criterion and Process
5. Eligible Entities and Organizations

Preliminary Concepts

Issues and Considerations (continued)

1. Funding Allocation

Options	Considerations
Geographic	<ul style="list-style-type: none"> • Allocate a higher amount of funding to geographic areas with the greatest opportunity • Allocate an equal amount to all geographic areas • Ensure that all geographic areas get a minimum amount of Outreach and Education Grant dollars. However, establish a list of priorities for geographic areas that receive a higher grant amount based on the number of uninsured
Non-Geographic	<ul style="list-style-type: none"> • Establish a “special priorities fund “ to target other markets that are non-geographic such as: <ul style="list-style-type: none"> ✓ Specific sectors experiencing disproportionately high rates of uninsured (e.g. restaurant workers, truckers, construction, etc.) ✓ Specific cultural and linguistic groups that are disproportionately represented among California’s uninsured, including hard-to-move communities ✓ Newly eligible groups

Recommendation: Hybrid

Geographic and Non-Geographic

- Targets resources to maximize opportunity in locations with the highest uninsured population density.
- Ensures dissemination of grant dollars among all regions and markets in the state, including hard-to-move, rural, limited English proficient and other specialty populations.

Preliminary Concepts

Issues and Considerations (continued)

2. Grant Award Size and Period

Options	Considerations
<p>Offer a range of grant award sizes, that might include:</p> <ul style="list-style-type: none"> • Small Grants: Up to \$15,000 • Medium Grants: Up to \$100,000 • Larger Grants: Up to \$250,000 <p>(e.g. grant to a collaborative and allow grantee to disperse funding within their collaborative)</p>	<ul style="list-style-type: none"> • Preference for multi-year Awards, with following elements: <ul style="list-style-type: none"> ✓ Work concentrated at open enrollment ✓ Contingent on good performance ✓ Contingent on federal funding approval • Grant management costs. • Organizational administrative costs for small awards. • Allowing organizations with access to small target markets to participate. • Reaching every region in the state and target markets with limited funding. • Cost-effectiveness of proposed scope of work.
<p>Allow applicants to establish their proposed budget within their grant size.</p> <p>(e.g. applicants applying for the smaller award could request less than \$50,000)</p>	

Recommendation: Hybrid

Offer a variety of small, medium, and large grant awards. Offer a range of grant award sizes with the following “up to” amounts:

- \$15,000
- \$50,000
- \$100,000
- \$175,000
- \$250,000

Preliminary Concepts

Issues and Considerations (continued)

3. Required Grant Activities and Statement of Work

Options	Considerations
<p>Allow organizations to propose their own scope of work.</p>	<ul style="list-style-type: none"> • Ensuring that organizations employ methods likely to produce the desired result - increased awareness, decreased barriers and a readiness to act.
<p>Mandate specific deliverables per award size and establish allowable outreach and education activities including, at a minimum, the following examples:</p> <ul style="list-style-type: none"> • Providing Information • Checking for Understanding • Call to Action • Ethnic Media Events • Community Events • Distribution of Brochures and Flyers • Consumer referrals to affordable health insurance programs 	<ul style="list-style-type: none"> • Allowing for innovative and creative approaches to reaching diverse markets. • Delivering a cost-effective, accountable and effective program. • Providing accurate, clear and consistent messages and information to consumers. • Ensuring that organizations provide reporting requirements.

Recommendation: Hybrid

Provide broad guidelines, minimum deliverables and allow organizations to propose their own specific creative approaches and tactics for reaching their target audience.

Preliminary Concepts

Issues and Considerations (continued)

4. Eligible Entities and Organizations

Options	Considerations
501(c)(3) and non-profit organizations	<ul style="list-style-type: none"> • Level of access to target markets and ability to leverage resources. • Federal or state guidelines restricting eligibility to receive federal funds. • Alignment of vision, mission and values with the Project Sponsors. • Established relationships with target markets.
School districts or community colleges	
Trade, Industry, and professional organizations	
Public agencies	
Allow specific for-profit companies (e.g. pharmacies, for-profit urgent care clinics) - TBD	
Allow collaboratives that have demonstrated capacity to coordinate services and are under the coordination of a 501(c)(3) or other public agency	

Preliminary Concepts

Issues and Considerations (continued)

5. Selection Criterion and Process

Considerations

- Demonstrate experience performing outreach activities .
- Provide access to those counties and markets where the greatest opportunity exists in terms of number of uninsured and eligible Californians.
- Ensure that all regions of the state, including hard-to-move (e.g. “invincibles”), limited-English proficiency, and rural populations will benefit from the program.
- Reflect the cultural and linguistic diversity of the target markets.
- Demonstrate the capacity to deliver a cost-effective and evidence-based program likely to result in increased awareness, fewer perceived barriers and ultimately, a commitment to act.

Questions/Comments

Outreach and Education Grant Program

Federal Establishment Support and Exchange Blueprint

Federal Establishment Grant Application Timelines and Decision for California

Planned Quarterly Application Dates (Level 1 and Level 2)		
2012	2013	2014
<ul style="list-style-type: none"> • November 15 	<ul style="list-style-type: none"> • February 15 • May 15 • August 15 • November 15 	<ul style="list-style-type: none"> • February 15 • May 15 • August 15 • November 15

Federal Establishment Support Next Steps:

- Exchange plans to submit grant application on November 15
- Need to determine whether Level 1 or Level 2 request best meets Exchange needs
- Exchange staff will make a recommendation to the Board at October meeting

Blueprint Application Structure and Key Dates

Exchange Activities include:

1. Legal Authority & Governance
2. Consumer & Stakeholder Engagement & Support
3. Eligibility & Enrollment
4. Plan Management
5. Financial Management, Risk Adjustment & Reinsurance
6. SHOP
7. Organization & Human Resources
8. Finance & Accounting
9. Technology
10. Privacy & Security
11. Oversight, Monitoring, & Reporting
12. Contracting, Outsourcing, & Agreements
13. State Partnership Exchange Activities

Blueprint Key Dates:

- Completed Blueprint and Model Declaration Letter submitted to CCIIO - **November 16, 2012**
- Approval Letters to States; Conditional Approval begins - **January 1, 2013**

Proposed 2013 Exchange Board Calendar

January 17

February 21

March 21

April 25

May 23

June 20

July 25 – Tentative

August 22

September 19

October 24

November 28

December 19 – Tentative

All Thursday meetings

Locations to be determined

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Visit our website at

<http://www.hbex.ca.gov>

And join our listserv